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Report of the Organization for Economic Cooperation and Development on presentation of statistical data and metadata

Note by the Secretary-General

In accordance with a request of the Statistical Commission at its thirty-fifth session,[a] the Secretary-General has the honour to transmit to the Commission the report of the Organization for Economic Cooperation and Development (OECD) for information. Following the presentation to the Commission in 2004 of an outline for a proposed *Data and Metadata Reporting and Presentation Handbook*, OECD prepared draft versions of the *Handbook*. The draft presented to the Commission in 2005 as a background document incorporates comments and suggestions received from international organizations and national agencies in both OECD and non-OECD countries over the last 12 months. It should be emphasized that the format etc. of the *Handbook* allows for the incorporation of emerging issues on data presentation as they arise in future. Final comments and guidance are sought from member countries on the second draft of the *Handbook*, particularly on the issues outlined in section V of the present report.

* E/CN.3/2005/1.
[a] *Official Records of the Economic and Social Council, 2004, Supplement No. 4* (E/2004/24), chap. I.A.

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I. Background

1. A proposal for the development of a handbook containing guidelines and recommendations for the reporting and presentation of data and metadata was submitted by the Organization for Economic Cooperation and Development (OECD) to the Statistical Commission for guidance at its thirty-fifth session, in March 2004. The Commission took note of the work done by OECD in the preparation of the proposal.

2. Following the thirty-fifth session of the Commission, OECD prepared a first draft of the *Data and Metadata Reporting and Presentation Handbook*, drawing on existing relevant international statistical guidelines and recommendations and advice etc. from national statistical institutes and central banks in OECD member countries. That draft was first presented and discussed at the June 2004 meeting of the OECD Short-term Economic Statistics Expert Group and subsequently at the fourth meeting of the Committee for the Coordination of Statistical Activities (CCSA) in September 2004. CCSA expressed strong support for the development of such a *Handbook*, which it believed would also constitute a useful reference source for developing countries. It was suggested that feedback on draft versions from non-OECD countries should be actively sought as well as the inclusion of presentation practices in non-economic statistical areas. Committee members also noted the significance of the *Handbook* in the context of the work on statistical data and metadata exchange (SDMX) in particular and in making effective arrangements for sharing of data among international agencies in general.

3. The second draft of the *Handbook* is submitted to the Commission for comment as a background document.

II. Scope of the *Data and Metadata Reporting and Presentation Handbook*

4. The *Handbook* draws a clear distinction between data-presentation standards involving table layout, font, type faces, readability, graphical presentation etc. used by both international organizations and national agencies and standards for the reporting of data by national agencies to international organizations. Although the *Handbook* touches on issues of presentation, it also outlines standards for data reporting. It provides a small number of specific recommendations covering the two broad dimensions in which all data may be reported, namely:

- Types of data: absolute figures, indices, growth rates and ratios
- Form of data: raw (original or non-seasonally adjusted series), working day adjusted, seasonally adjusted, trend-cycle.

5. The *Handbook* also emphasizes the need for national agencies and international organizations to prepare adequate metadata describing concepts, collection and processing practices, as well as reporting and presentation practices. Such metadata must also be readily accessible and understood by users with different degrees of statistical expertise. Recommendations here will pick up on previous work (and work to be undertaken over the next 12 months) by the Workshop on Statistical Metadata.

6. In addition, the draft *Handbook* covers a small number of key data-reporting practices that also have a significant impact on data interpretability and in respect of which the different approaches that are currently used by national and international agencies complicate comparisons of national data. These include different:

- Data revision presentation practices
- Reporting practices for the presentation of series breaks
- Inconsistent practices for the linking of time series
- Practices for the reporting of sampling and non-sampling errors
- Base years in the presentation of indices
- Citation practices
- Incomplete practices for the presentation of administrative data.

7. The *Handbook* outlines key recommendations and/or good practice with regard to each of these. Such practices are consistent with sound governance in statistics encompassed, either implicitly or explicitly, in the United Nations *Fundamental Principles of Official Statistics* and the United Nations *Handbook on the Operation and Organization of a Statistical Agency*. The range of reporting practices outlined the initial version of the *Handbook* could be expanded in subsequent web versions to include other emerging data and metadata reporting and presentation issues. Finally, the introductory sections of the *Handbook* provide context and linkages to current international initiatives on data and metadata exchange, in particular those under the umbrella of SDMX.

III. Work on the *Handbook* undertaken since March 2004

8. The second draft of the *Handbook* incorporates comments and suggestions provided by numerous national statistical institutes and central banks in OECD member countries. Very detailed input was also received from other international organizations, in particular, the Statistical Office of the European Communities, the International Monetary Fund and the World Bank. Comments from the Bank included recommendations etc. relevant to social and demographic statistics that have been incorporated into the second draft, although further input from other international organizations and national agencies for these statistical domains are still required. The current draft has also been referred to relevant agencies in all OECD member countries for final comment.

9. Comments and suggestions regarding data presentation and reporting practices specific to developing countries are sought both through the consultation process associated with the thirty-sixth session of the Commission and by a more targeted approach to a range of developing countries undertaken by OECD, with the assistance of each of the regional commissions in December 2004. The second draft of the *Handbook* has also been disseminated to all CCSA members for final comment, including United Nations specialist organizations.

IV. Future work and timelines

10. The schedule for the preparation and issuance of the *Handbook* is provided below. OECD will incorporate relevant comments and suggestions into a final version of the *Handbook* for submission to the OECD Committee on Statistics for approval in June 2005. Hard-copy and web versions of the *Handbook* will be published in the second half of 2005. Publication will coincide with a publicity campaign by OECD to encourage implementation of the guidelines and recommendations included in the *Handbook* and for national and international organizations to provide appropriate references and links to it on their web sites etc.

Steps in the preparation and issuance of the Handbook	*Time frame*
Submission to the Statistical Commission at its thirty-sixth session, OECD member countries, developing countries and CCSA members for comment	17 December 2004
Incorporation of comments and suggestions from the above constituencies in the preparation of the final draft of the *Handbook*	1 May 2005
Submission to OECD Committee on Statistics for endorsement	June 2005
Publication of English and French language versions by OECD	September-November 2005
Development of data and metadata reporting and presentation web site to incorporate emerging issues	31 August 2005
Campaign to publicize both hard-copy and web versions of the *Handbook*	September-December 2005

11. One of the issues discussed with a number of agencies in the preparation of the second draft of the *Handbook* concerns the appropriate balance in the level of detail and background information that should be included in the actual text of the *Handbook*. There is a wide range of literature on many of the topics covered in the *Handbook* at both the national and international levels and those used in the preparation of the *Handbook* to date are provided in the list of references at the back of the draft version.

12. The authors of the *Handbook* are still coming to grips with obtaining an appropriate balance between providing sufficient detail and specific guidance on reporting and presentation recommendations that would be of use to users without making the resulting publication too large and unwieldy. Extensive use has been made of links and references and publications. Furthermore, the final draft of the *Handbook* will also include selected examples of good practice in information boxes, which will serve both to illustrate the recommendations and provide breaks in the text.

V. Issues for which comments and guidance are sought

13. Comments and guidance are sought with regard to:

(a) The scope of issues currently included in the draft *Handbook*. Are any relevant/key data and metadata presentation and reporting issues not covered for:

- **Social and demographic statistics**
- **Developing countries**
- **Annual statistics**
- **Economic statistics**

(b) Any relevant sources/references at the national or international levels that are not currently used. These include relevant examples of recommended practice on data presentation and reporting.

14. Comments and suggestions can also be forwarded directly to Denis Ward (denis.ward@oecd.org).